



Building a Donor Growth Engine

YHB Not-for-Profit Symposium | June 2, 2026

Outcome for Today

→ To provide practical tools for upgrading your donor growth engine.



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Who's In the Room?

What is your role?

- Executive Director / CEO
- CFO or Finance Staff
- Marketing /Development Staff
- Other

What is the size of your org?

- Under \$1M
- \$1M to \$5M
- Over \$5M

How are you organized?

- Marketing & Development *integrated*
- Marketing & Development *separate* departments
- Other



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The bad news?

Activity > impact

The good news?

You're not alone.

It's fixable.



Overview for Today

- I. **The Framework:**
Strategy, Systems, and Staffing
- II. **Self-Assessment**
- III. **Practical Tools**
Audience Persona
Engagement Funnel
- IV. **Q&A**



Bonus: *The Pomelo Principle*

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The Framework

- A. Strategy** The **plan** connecting organizational **goals** to audience **needs**
- B. Systems** The **tools** needed to deliver the Strategy
- C. Staffing** The **people** needed to deliver the Strategy



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The Self-Assessment

Strategy	1	Our organization's goals are specific and quantifiable.
	2	We fully understand the needs of our key target audiences.
	3	We have a documented plan that connects these goals with their needs .
	4	We know what success looks like for marketing and development (beyond \$).
Systems	5	Our brand guidelines are documented and have templates our team actively uses.
	6	We have a CRM that reliably tracks contact engagement through donor activity.
	7	Our tools (email, social, design, AI-platform) work together in a coordinated way.
	8	All of our workflows are documented in a central playbook.
Staffing	9	There is one person who is clearly accountable for marketing / development results.
	10	Our team has the skills and capacity to execute our marketing Strategy.



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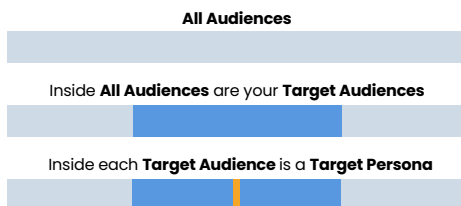
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Definition: Audience Personas



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Examples: Audience Personas



EMI AUDIENCE PERSONA	
Person	Personner
<ul style="list-style-type: none">• 30-45• Bachelor's degree• Married• Lives in TX	<ul style="list-style-type: none">• Adult• High school or certification
Interests	Experiences/Needs/Pain Points
<ul style="list-style-type: none">• Financial• Engineering of all types (civil, electrical, mechanical, aerospace)• Construction management• Marketing	<ul style="list-style-type: none">• Health care• Construction• HR• Management• Marketing• Family time• Health & development



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Why: Audience Personas



Forces Focus

If you try to mean everything to everyone, you will mean nothing to those that matter most.



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Why: Audience Personas



Forces Focus



Informs Every Decision

What would your audience do?



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Why: Audience Personas



Forces Focus



Informs Every Decision



Creates Compassion

Audiences are real people.



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Process: Audience Personas

- 1. Gather** your team
- 2. Prioritize** your segments
- 3. Create** v1 together
- 4. Test** it



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First, prioritize your audiences (1 of 2)

Based on giving behavior

Priority	Segment
	Mass / Annual Fund
	Mid-Level
	Major Donors
	Planned Giving / Legacy
	Corporate / Institutional
	Foundation / Grant
	Lapsed Donor
	Volunteer / Non-Donor



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First, prioritize your audiences (2 of 2)

Based on giving motivation.

Priority	Segment
	The Legacy Donor
	The Community Champion
	The Mission Believer
	The Grateful Beneficiary
	The Social Influencer
	The Major Gift Prospect
	The Foundation Funder
	The Corporate Partner



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Next, build out the Persona

What is their name ?	
What is their segment ?	
Age? Gender? Marital status? Life stage ?	
What big things do they care about ?	
What other organizations do they give to?	
What barriers do they see in giving?	
How do they gather information ?	
What are ways they want to engage ?	



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Example: Meet Margaret

What is their name ?	Margaret
What is their segment ?	Legacy Donor
Age? Gender? Marital status? Life stage ?	64, female, widowed, retired, financially stable
What big things do they care about ?	Education equity, local community, leaving something meaningful behind
What other organizations do they give to?	Library foundation, church, regional arts org
What barriers do they see in giving?	Skeptical of overhead, wants proof of impact
How do they gather information ?	Word of mouth, annual reports, physical mail, in-person events
What are ways they want to engage ?	Personal calls from leadership, site visits, meaningful recognition



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Practical Tool #2
The Engagement Funnel
(aka a Marketing Strategy)



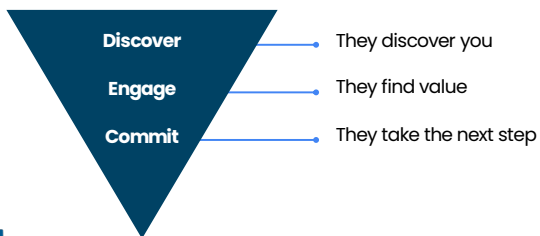
Definition: Engagement Funnel

A simple **path**
to invite your **Audience Persona**
from being **strangers** to
making a **commitment***



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Definition: Engagement Funnel



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Why: Engagement Funnel

- Helps you **organize**
- Helps you **prioritize**
- Helps you find **upside**



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First step: map out touchpoints

Stage	Channel	Metrics	Results
Aware	Website	# of unique visitors	
	Social media	# of followers	
	SEO / AEO	Rankings	
Engage	Newsletter	# of subscribers	
	Special events	# of attendees	
	Site visit / program tour	# of attendees	
Commit	Volunteer opportunities	# of first-time volunteers	
	Personal asks	# of first-time gifts	
	Online giving page	# of first-time gifts	



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Q&A



Your Practical Next Steps

- This week** Take the first cut at your **Audience Persona**
- This month** Map your current activities against the basic **Engagement Funnel**
- This quarter** Test something new (**elimination, upgrade or expansion**)



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What was helpful today?



Care to talk marketing?

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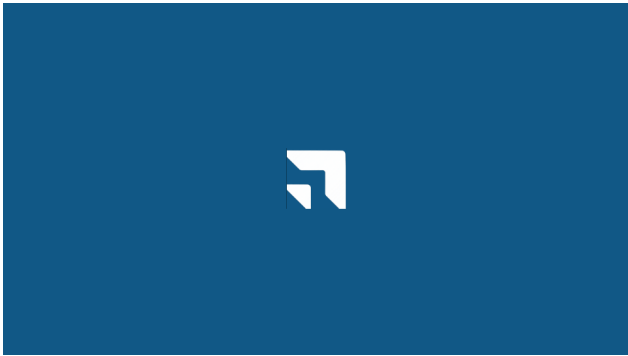


We can also talk...

- Capital campaigns
- Legacy giving
- Executive search
- Graphic design
- Tech stack support
- Urban farming




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Bonus

The Pomelo Principle



What is a pomelo?





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Option 1

A pomelo (*Citrus maxima* or *Citrus grandis*) is a citrus fruit native to Southeast Asia. The rind is very thick but soft and easy to peel away. The resulting fruit has a light yellow to coral pink flesh and can vary from juicy to slightly dry and from seductively spicy-sweet to tangy and tart.



Option 2

A pomelo is basically a supersized grapefruit with a very thick and soft rind.

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Dan Kennedy
[Dan Kennedy Marketing](#)

Building a Donor Growth Engine: Turning Marketing Activity into Impact ✕

Many nonprofits invest significant time and effort in marketing such as emails, campaigns, events, and social media, yet still struggle to generate consistent donor growth. The challenge is rarely effort. More often it is the absence of a clear framework that connects organizational goals, audience needs, marketing systems, and team capacity.

In this interactive workshop, participants will complete a short self-assessment to evaluate their organization's current approach to marketing and donor engagement. We will explore a practical framework for building a donor growth engine that aligns strategy, systems, and staffing.

Participants will leave with a clearer understanding of where their approach may be breaking down and practical next steps for turning scattered marketing activity into intentional growth.

